



GURU TRAVEL

LUXURY IN EVERY JOURNEY

# The Following Up: What to do and How!





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Dear New Guru Travel Advisors,

One of the biggest game-changers when it comes to closing a sale quickly is setting clear expectations before the proposal call.

I always make sure clients know to have all decision-makers present and that we'll be reviewing options tailored to their needs. As we walk through the proposal together, I pause at the end to ask if there's anything they were hoping to see that isn't included. That small question reinforces that I've built the plan based on exactly what they asked for—within their budget. It builds trust and makes it so much easier to confidently close the deal right on the call.

Happy Selling,

Kelly Ortiz, Your Guru Travel Guide



### **Within 24 Hours – Friendly Check-In Text**

Hey [Name], just checking in to see if any questions came up about your proposal! I'm here to help with anything you need to make the decision easier.

### **48 Hours Post-Proposal – Gentle Reminder Email**



Subject: Any final tweaks before we lock it in? ✨

Hi [Name],

Before we go ahead and reserve your trip, I just wanted to see if there were any changes you'd like to make. We want everything to be just right for your vacation, so let me know if you'd like to adjust anything!

### **72 Hours – Encouraging Text Message**



Hey [Name], just a heads up—this destination can book up quickly, and availability can shift fast. If you're feeling ready, we should secure your spot soon so you don't miss out!

### **Day 3 – Personal Follow-Up Call**

If it's been a few days and things have gone quiet, give your client a call. Keep it light and supportive—

"Hi [Name], I just wanted to check in and see if there was anything about the proposal that didn't feel quite right. Sometimes it's easier to talk things through, and I'd love to understand where you're at so we can make sure this trip works perfectly for you."



## Light Check-In After Missed Call

Subject: Just tried to catch you!



Hi [Name],

I gave you a quick call because I'm really excited about the trip we designed—I honestly think we nailed it! But if something feels off or needs a tweak, I'm more than happy to adjust anything. Just let me know how I can help bring your dream getaway to life!

### Day 7 Ghosting Follow-Up



Hi friends! I'm starting to worry I might've missed the mark here. 🙄 I really want this trip to be just right for you—so if something doesn't feel perfect, I'd love the chance to fix it. Let me know!

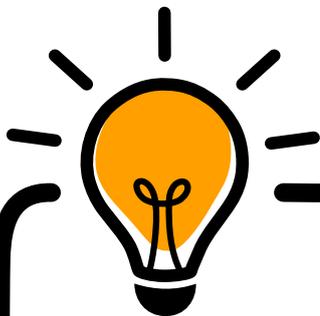
### Day 10 Graceful Close-Out

Subject: Closing Out Your Proposal



Hi [Name],

I totally understand if your plans have shifted or the timing isn't quite right. I never want to crowd your inbox, so unless I hear from you, I'll go ahead and close this proposal out. (One perk of Travefy is that we can tidy things up without clutter!) If travel finds its way back onto your radar, I'd love to pick up where we left off. Wishing you a wonderful week ahead!



At Guru Travel, we use Travefy for a reason—it lets us keep things organized and respectful of your time. I recommend shutting off quote access after 3 days of no response. After that, a light quarterly follow-up can keep the door open without overwhelming the client.